

**Cooke Access Portal (CAP)
Scholar Manual for Undergraduate
and Graduate Scholars**

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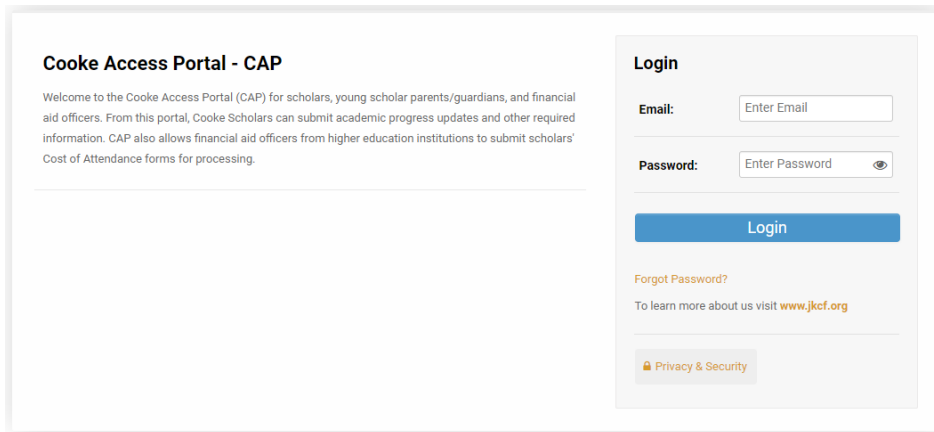
Introduction

Welcome to the Cooke Access Portal (CAP), a system created by the Jack Kent Cooke Foundation to help scholars fulfill their scholarship requirements. You will use CAP throughout your time as a Cooke Scholar to input grades, upload transcripts, communicate with the foundation and perform other required tasks.

Accessing CAP

To sign in, go to <https://jkcf.org/cap> and log into your account. If you have forgotten your password, click the [Forgot Password?](#) link to set a new one.

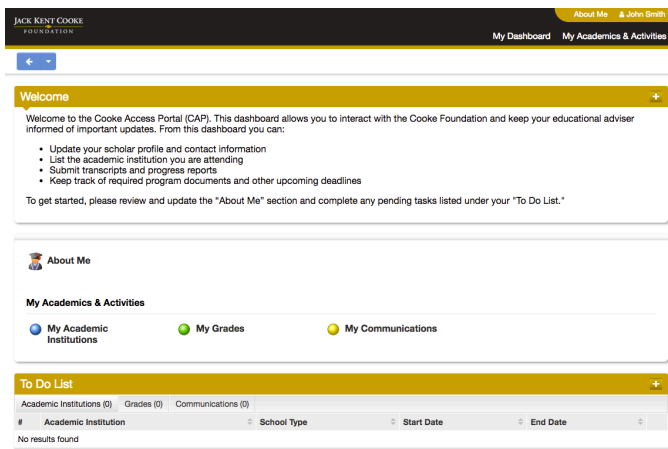
The sign in screen will look like this:



The screenshot shows the login interface for the Cooke Access Portal. On the left, there is a header "Cooke Access Portal - CAP" followed by a welcome message: "Welcome to the Cooke Access Portal (CAP) for scholars, young scholar parents/guardians, and financial aid officers. From this portal, Cooke Scholars can submit academic progress updates and other required information. CAP also allows financial aid officers from higher education institutions to submit scholars' Cost of Attendance forms for processing." On the right, there is a "Login" section with two input fields: "Email:" with a placeholder "Enter Email" and "Password:" with a placeholder "Enter Password" and an eye icon for toggling visibility. Below these fields is a blue "Login" button. Underneath the button are links for "Forgot Password?" and "To learn more about us visit www.jkcf.org". At the bottom of the login section is a "Privacy & Security" link with a lock icon.

Dashboard

When you first log in, you'll start on your CAP dashboard. In the upper right corner of the screen, you will also see a link to My Dashboard. Clicking on this link will take you back to your main dashboard. From the dashboard you can update your personal information, upload your grades, complete your COA, submit your bills, communicate with the Cooke Foundation, and access your personal To Do List.



The screenshot shows the dashboard interface. At the top, there is a navigation bar with the Jack Kent Cooke Foundation logo on the left and "About Me" and "John Smith" on the right. Below the navigation bar, there are two main sections: "My Dashboard" and "My Academics & Activities". The "Welcome" section contains a message: "Welcome to the Cooke Access Portal (CAP). This dashboard allows you to interact with the Cooke Foundation and keep your educational adviser informed of important updates. From this dashboard you can:" followed by a list of tasks: "Update your scholar profile and contact information", "List the academic institution you are attending", "Submit transcripts and progress reports", and "Keep track of required program documents and other upcoming deadlines". Below this list is a note: "To get started, please review and update the 'About Me' section and complete any pending tasks listed under your 'To Do List.'" The "About Me" section is partially visible. The "My Academics & Activities" section has three sub-sections: "My Academic Institutions", "My Grades", and "My Communications". The "To Do List" section is currently empty, showing a table with columns for "Academic Institutions (0)", "Grades (0)", and "Communications (0)". The table has headers for "#", "Academic Institution", "School Type", "Start Date", and "End Date", and a message "No results found" below it.

About Me

To get started, click on the About Me icon on your dashboard. About Me is where you review and edit all your personal information, including contact and demographic information. You must keep your information up to date; it is the primary way in which the Foundation will communicate with you. Please note that you will be prompted periodically to update your information.

Main

Please click through all of the tabs below to ensure that your profile is accurate. You can add or update information as needed. The Cooke Foundation will use the contact information you provide in this profile for all communications.

Name | Addresses | E-Mail Addresses | Phone Numbers | Emergency Contact | Demographics | Hometown | Citizenship

Scholar Salutation:

* First Name:

Middle Name:

* Last Name:

Suffix:

Preferred Name:

Pronunciation:

Next

Save

Name

Use this tab to add your preferred name (if you prefer a name different from your legal name) and provide pronunciation of your name. If your first or last name changes, please contact us at cap@jkcf.org with changes to your name.

Remember to click the Save button on the bottom of the page when you are finished updating data in each of the sections.

Addresses

Use this tab to provide the Foundation with your address(es). To edit, add, or delete your addresses, click the Add/Edit Addresses link. From there, you may edit any of your addresses or add a new address by clicking the New Address button. Make sure to properly designate your addresses (School, Permanent, Temporary) and indicate the address you'd like the Foundation to use as your primary address. We may periodically mail correspondence to your primary address.

Email Addresses

Your primary email address is also your username for the system. If you use other email addresses, please enter them in the Email Addresses tab, but keep in mind that the address in the Primary Email field is the one you will use to log in to CAP. Changing your primary email address will change the username you use to sign in. If we have trouble reaching you at your primary email address, we may attempt to reach you at the additional email addresses you provide.

Phone Numbers

Like the Email Addresses tab, enter your primary phone and any other phone numbers where you may be reached.

Emergency Contact

You are required to designate at least one emergency contact and may list one additional contact as well. We require this information in case we need to reach someone during an emergency or if we are unsuccessful in contacting you. Do not include someone you do not wish the Foundation to contact or someone who is difficult to reach.

Demographics and Hometown

Some of the fields in your profile were populated from information in your scholarship application. You may update your demographic and hometown information at any time. If you find that you are unable to make a change and/or see a mistake that you are unable to update, please contact the Cooke Foundation at cap@jkcf.org.

Country of Citizenship

If your country of citizenship changes, please update it on this tab. If you have dual citizenship, please pick one of your countries of citizenship to list here.

My Academic Institutions

In the My Academic Institutions section, you provide information about the school you are currently attending. While most scholars will only attend one institution during their scholarship program, some will attend a different institution if participating in approved summer study, study abroad programs, etc.

Please note: Adding an institution in CAP does not constitute a request for summer study funding, to transfer to a new institution, or to add additional time to your Cooke scholarship. Please contact your educational adviser if wish to discuss attending a different institution.

Instructions

On this page, you can enter your academic institutions. You will be asked to provide additional information about your college/university, including the academic schedule and your estimated enrollment and graduation dates. Once submitted, your school will be reviewed by Cooke Foundation staff and added to your profile upon approval.

Please note: Adding an institution in CAP does not constitute a request for summer study funding, to transfer to a new institution, or to add additional time to your Cooke scholarship. Please contact your educational adviser if you wish to discuss attending a different institution.

[Add New College Scholar \(CS\) Academic Institution](#)

My Academic Institutions

#	Scholarship	Academic Institution	School Type	Status	Start Date	End Date	
1	College Scholar (CS)	Stanford University	College/University	Submitted	09/01/2019	05/31/2023	View

Adding a New Academic Institution

1. Click the Add New Academic Institution button.
2. Select one of the following as the type of institution and click Save:
 - College/University – if you are enrolled in an undergraduate degree program.
 - Graduate School – if you are enrolled in a graduate program.

Once you choose a school type, you will see this page:

The screenshot shows a user interface for the Jack Kent Cooke Foundation. At the top, there is a navigation bar with the logo on the left and 'About Me' and 'John Smith' on the right. Below the navigation bar, there are links for 'My Dashboard' and 'My Academics & Activities'. The main content area is titled 'John Smith' and contains a form for adding a new academic institution. The form has several sections: 'School Type' with a dropdown menu set to 'College/University'; 'Academic Institution' with a text input field; a section titled 'Can't Find your School?' with a blue button 'Enter New Academic Institution'; 'Schedule' with a dropdown menu set to 'Select One'; 'Are You Currently Enrolled?' with radio buttons for 'Yes' and 'No'; and 'Anticipated Degree(s)' with a blue button 'Enter Degree(s)'. At the bottom of the form, there are 'Cancel' and 'Submit' buttons.

3. In the Academic Institution field, start typing the name of your institution. As you type, a list of schools will populate. If your school is listed, select it. If you don't initially see your school, continue to type the complete name or try different variations of your school's name.

If you are unable to find your school in the list, refer to the next section in this manual titled Registering a New Academic Institution to register your school.
4. Graduate Scholars will enter the name of their enrolling school or program.
5. From the Schedule dropdown, select your school's academic calendar. The choices are Semester, Quarter or Trimester. Please note that if your school has three main terms (fall, winter, spring), you should select Trimester as your school's schedule even if your school may refer to them as quarters. Only if your school has four actual quarters in which you typically enroll should you select Quarters. (Four full quarters of enrollment usually applies only to graduate programs.)
6. Indicate if you are currently enrolled at this institution.
 - If you are currently enrolled or will be soon, select Yes and enter your Anticipated Graduation Date. If you aren't sure of your graduation date, please provide your best estimate.

- If you are no longer enrolled at the institution, select No and answer the “Did you Graduate with a Degree?” question. If you select Yes, enter your graduation date and the term in which you graduated.
7. Click on the Enter Degree(s) button to enter your intended degree and major/field of study information. Click the plus sign button (+) to add a degree.

For Undergraduate Scholars the screen will look like this:

Instructions

Please enter your anticipated degree(s) below.

Degree(s)

Degree Type	Major	Minor (optional)
Select One	Select One	



- Degree Type – Select the degree you are pursuing or plan to pursue.
- Major – Select your major. If you have yet to decide on a major, choose Undecided at the bottom of the list. If you are working towards or have completed more than one major, use the plus button to add a new row and provide additional information.
- Minor – If you have a minor, select it from the list. If you are working towards or have completed more than one minor, use the plus button to add a new row and provide additional information. If you have more minors than majors, you may enter duplicate degree and major information in order to choose an additional minor.

Please note: The Foundation does not typically fund more than one major and minor if additional majors/minors add more time to your degree. Please contact the Foundation if you plan to pursue more than one major or minor.

You may edit or delete degree information when entering your grades. See the [My Grades](#) section for further details.

For Graduate Scholars, the screen will look like this:

Instructions

Please enter your anticipated degree(s) below.

Degree(s)

Degree Type	Graduate Area of Study
Select One	Select One



- Degree Type – Select the degree you are pursuing.
- Graduate Area of Study – Select your field of study. If you are working towards or have completed more than one graduate degree, use the plus button to add a new row and provide additional information. If you have more than one field of study per degree, you may enter duplicate degree types in order to choose an additional area of study.

You may edit or delete this information when entering your grades.

8. Once you are finished entering your information, click the Save and Close buttons to save your information and close the window.
9. When you have entered all required information, click the Submit button on the bottom of the Add New Academic Institution page. Once submitted, your school information will be verified by Cooke Foundation staff within 1-2 business days.

Registering a New Academic Institution

If you were unable to find your college or university in the school list, you must register your school by providing the information. Follow the steps below to register your school.

1. On the Add New Academic Institution form, click the Enter New Academic Institution button.

Can't Find your School?

Enter New Academic Institution

2. A window will pop up asking you to provide your school's name, address and website and your name, phone number and email address.
3. Click the Submit button at the bottom. Once we have verified your school, we will notify you via email that you may now complete the academic institution section of your profile.

My Grades

The Foundation requires scholars to submit grades at the end of every term. Promptly submitting your grades is required to maintain good standing in your scholarship program. Please note that an official transcript is required every spring term.

At the end of every term, you will receive an email notification that it is time to submit your grades in CAP. A request to enter grades will show up on your To Do List on your dashboard. Please note, you will not be able to submit grades until the request appears on your To Do List.

To Do List				
ACADEMIC INSTITUTIONS (0)		GRADES (1)	COMMUNICATIONS (1)	
#	Academic Institution	Calendar Year	Term	Due Date
1	Stanford University		Semester -	01/25/2018

Adding New Grades

Before you enter your grades, you must have a copy of your most recent transcript. You cannot edit your grade entry once you click Submit, therefore do not start this process until all of your grades have been posted by your school. Your transcript must contain data for all of the required fields.

1. To begin entering your grades, click on Grades on your To Do List.
2. Click the View button next to the institution for which you are submitting grades.
3. Enter your year in school and the academic year.
4. Enter the school term for which you will be entering grades.

On this page, you will input your term grades to submit to the foundation. To do so, select your year in college and the calendar year for the grades being entered. After you click Save, you may select the school term for the grades being entered. Then answer questions regarding your term GPA and cumulative GPA, if applicable. After you save your responses, you will be able to add your course grades and upload a copy of your transcript.

* Due Date: 04/16/2018

School: Harvard University/Harvard College

Enter Grade and Term Information

* Year of Study

Select One

If you are uncertain of your year in school, please contact your educational adviser.

* Academic Year

Select One

* Term

Select One

5. Review your degree information. Click Enter Degree(s) button to review and update your degree, major/field of study, and minor information, if necessary.

For Undergraduate Scholars Only:

1. Click on Enter Course(s) button. A new window will open for you to enter information for each course. To add a course, click on the plus sign button (+).

Instructions

Click the "+" button to add grade information for all of your courses for the term.

For each course, enter the following:

- Course Number – enter "1" if course number is not listed on your transcript
- Name of Course Provided on Transcript – enter the exact course name as it appears on your transcript
- Subject – select the subject from the list that most closely matches your course. If you are unsure which subject your course belongs in, please review [this list](#)
- Credit Hours – enter "0" if credit hours are not listed on your transcript
- Course Grade – enter the grade you received in the course
- Counts Towards Major – does this course count towards your major? If you have not yet declared a major, please select "I'm Not Sure"
- Counts Towards Minor – this field will appear if you selected a minor in the "degrees" section

Course(s)

Course Number	Name of Course Provided on Transcript	Subject	Credit Hours	Course Grade	Counts Towards Major
<div style="text-align: right;"><input type="button" value="Save"/> <input type="button" value="Clear"/> <input type="button" value="Close"/></div>					

For each course, enter the following:

- Course Number – enter “1” if course number is not listed on your transcript
- Name of Course Provided on Transcript – enter the exact course name as it appears on your transcript
- Subject – select the subject from the list that most closely matches the course
- Credit Hours – enter “0” if credit hours are not listed on your transcript
- Course Grade – enter the grade you received in the course
- Counts Towards Major – does this course count towards your major? If you do not have a major yet, please select “I’m not sure” from the dropdown.
- Counts Towards Minor – this field will appear if you selected a minor in the degrees section

Click the plus sign button to add grade information for all your courses for the term. The following is a screenshot of this page populated with grade information.

Instructions

Click the “+” button to add grade information for all of your courses for the term.

For each course, enter the following:

- Course Number – enter “1” if course number is not listed on your transcript
- Name of Course Provided on Transcript – enter the exact course name as it appears on your transcript
- Subject – select the subject from the list that most closely matches your course. If you are unsure which subject your course belongs in, please review [this list](#)
- Credit Hours – enter “0” if credit hours are not listed on your transcript
- Course Grade – enter the grade you received in the course
- Counts Towards Major – does this course count towards your major? If you have not yet declared a major, please select “I’m Not Sure”
- Counts Towards Minor – this field will appear if you selected a minor in the “degrees” section

Course(s)

Course Number	Name of Course Provided on Transcript	Subject	Credit Hours	Course Grade	Counts Towards Major
100	Introduction to biology	Life and Physical Sciences	3	A	Yes
105	Economics	Social Sciences and History	3	B+	Yes
			6.00		

+ Save Clear Close

2. After you have finished entering all of your course and grade information, click the Save and Close buttons on the bottom of the grade form.



For both Graduate and Undergraduate Scholars:

1. Click on the upload button under Upload School Grade Report/Transcript. This will open a file manager upload window. You may either drag your transcript file into the window from your computer or click the folder icon to find and select the file to upload. If you have only a paper transcript, scan and save it as a file or take a clear photo with your phone and upload the image. **Please note that your spring term transcript must be an *official* transcript. To upload an official transcript, you must request the transcript be sent directly to you. You may open the official transcript, scan it, and upload it as instructed above.**

File Manager

Drag and drop files here.

Maximum file size: 2 GB

2. Answer the questions regarding your term and cumulative GPAs. If your transcript lists a term GPA, select Yes and enter your term GPA. If your school does not provide term GPAs, select No and provide an explanation as to why there is no term GPA. Do the same for the following question regarding cumulative GPA.

*** Does your transcript include a term GPA?**

- Yes
 No

*** Term GPA**

?

*** Do you have a cumulative GPA?**

- Yes
 No

*** Cumulative GPA**

?

Notes

Use the notes section to share any additional grade information with your educational adviser.

3. If you have any comments you would like to include regarding your grades, use the notes section at the bottom of the page.
4. After you have provided all required grade information, click the Submit button.

My Communications

You may use the My Communications link to communicate with the Foundation. To access the communications tool, click on the My Communications link on your dashboard. This is the screen that will appear:

Instructions

In this dashboard, you can communicate with your educational adviser. You can discuss academic issues, share updates, or ask questions about scholarship requirements. Please write a brief two to three word description of the topic in the subject text box. Once you click save, a dialogue box will appear where you can write a more detailed note. Please allow your adviser a few days to respond.

[Add New Communication](#)

My Communications

Communications (0) | Communication E-mails (0) | Academic Institution E-mails (0) | Grade E-mails (0)

#	Question Type	Description	Deadline for Followup	Status
---	---------------	-------------	-----------------------	--------

Creating a New Communication

1. To create a new communication, click the blue Add New Communication button.

New Activity

Use this form to send a message to the Foundation. For the "Scholar Question Type" please select Academic and Advising, if you have an academic or advising question or select General Program, if you have a general program question. Please write a brief two to three word description of the topic in the subject box. Once you click save, a dialogue box will appear where you can write a more detailed note. Please allow us a few days to respond.

* Scholar Question Type

Select One

* Subject

Scholar Documentation

Click Save before adding attachments


[Save](#)

2. Select a Scholar Question Type.
 - Academic and Advising – if you have an academic or advising question.
 - General Program – if you have a general program question.
 - Finance-Related – if you have a finance-related question pertaining to your award.
3. In the Subject line, enter a brief description of your topic. This is like the subject line in an email.

4. Click the Save button.
5. If you have documents pertinent to your communication, click the Upload button under Scholar Documentation to upload a document.
6. On the left-hand navigation panel, you will see a Notes link.

7. Click on Notes. Then click on the plus sign button (+) to open a text box where you can type your question/message.

8. Once you are finished, click the Save button on the bottom. You can add multiple notes to a communication.
9. Click the Main link on the left-hand navigation panel, then click the Submit button on the bottom of the page to submit your communication to the Foundation.

Please note: If you click the Enable Dock button  in the upper right corner of the screen, it will open the Notes screen to the right and keep the Main screen open as well. After you dock the screen, start with #7 above to enter your question/message.

To Do List

Your To Do List is located at the bottom of your dashboard. It will list all tasks requiring your attention.

To Do List						
COMMUNICATIONS (0)		GRADES (0)	COA FORMS (0)	PAYMENTS (0)	LOAN FORGIVENESS AGREEMENTS (0)	ACADEMIC INSTITUTIONS (0)
#	Scholarship	Question Type	Description	Deadline for Followup		

Communications

When you receive a response to a communication you submitted or receive a new communication from the Foundation, a new item will appear on the Communications tab of your To Do List. Click the View button to review (and respond to) the communication.

Grades

At the end of every term, we will ask you to submit your grades. When grades are due, you will see a new item on the Grades tab of your To Do List. Click the View button to enter your grades.

COA Forms

At the beginning of each academic year, we will ask you to complete the Cost of Attendance (COA) process in order to determine your Cooke award (see below for detailed instructions about the COA process).

Payments

After you have completed the COA process and the Cooke Foundation has notified you of your award, you are able to upload your billing statements (see below for detailed instructions about the payment process).

Loan Forgiveness Agreements

If your Cooke award includes a forgivable loan component (undergraduate scholars only), we will ask you to accept, partially accept, or decline the loan offer(s). If you accept or partially accept, you will then be asked to sign your loan agreement letter(s) and upload your loan disclosure statement(s) (see below for detailed instructions about the loan process).

Academic Institutions

From time to time we may ask you to update information regarding your academic institution. If so, a new item will appear on the Academic Institution tab of your To Do List. Click the View button to the right of each item to access the Academic Institutions page and update your information.

Cost of Attendance (COA)

The Cooke Foundation will notify you when the Cost of Attendance (COA) is ready for completion. Please log in to your CAP account and from your dashboard, click the My COA Forms link or, on your To Do List, click on the COA Forms tab.

The screenshot shows a user dashboard with the following sections:

- About Me**: Represented by a graduation cap icon.
- My Academics & Activities**: Contains three items: **My Academic Institutions** (blue circle), **My Grades** (green circle), and **My Communications** (yellow circle).
- My Cost of Attendance Forms**: Contains three items: **My COA Forms** (grey circle), **My Scholarship Payments** (red circle), and **My Loan Forgiveness Agreements** (grey circle).

Below these sections is a **To Do List** header in a yellow bar. Underneath, there are five tabs: **COMMUNICATIONS (0)**, **GRADES (0)**, **COA FORMS (1)**, **PAYMENTS (0)**, and **LOAN FORGIVENESS AG**. The **COA FORMS (1)** tab is selected. Below the tabs is a table with a header row containing a '#' column, a 'Scholarship' column, and a 'Question Type' column with a dropdown arrow.

Once on the COA Forms page, click the View button on the far right that corresponds to the school you are attending/plan to attend.

Read the instructions at the top very carefully. In order to submit a successful COA, you must follow these instructions, *including clicking the link to access the COA worksheet*.

INSTRUCTIONS FOR THE COOKE SCHOLAR

- Complete the following information for the 2019-2020 academic year
- **BEFORE COMPLETING THE ONLINE FORM**, open the applicable COA worksheet below and use it to gather your school budget/costs information. You must take the COA worksheet to your school's financial aid office so a financial aid officer can help you complete it.
- If your school uses a semester calendar, use this [COA worksheet](#)
- If your school uses a quarter/trimester calendar, use this [COA worksheet](#)
- If you have been approved to receive Cooke summer study funding, a Summer COA worksheet will be sent to you as an email attachment.
- Please note, you will be required to upload your completed COA worksheet as well as your school budget/costs and financial aid summary in order to submit your COA.
- Please note, you will **not** have the ability to save and return to this form; you must complete all requested information in one sitting.
- You must enter a value in each expense field. If an expense does not apply to you, enter "0" (zero).
- Note that the cost for a computer may only be included for first year scholars. Enter "0" (zero) if you are a returning scholar.

- Financial Aid Officer section: If you do not have a specific Financial Aid Officer, enter the words “Financial Aid Office” in the name field and provide an email address and phone number for the office.
- If you have questions about the COA process, submit a communication via CAP. Click on the Contact Staff button at the bottom of your COA form and select Finance-Related from the Scholar Question Type drop-down. Please enter the date in the date of communication field prior to submitting.

COA Form Details

After reviewing the instructions, please complete the COA fields. Below are details on each section of the COA.

Student ID Number

Enter your college/university school identification number. If you do not have a school student ID number yet, enter your last name in the Student ID Number field.

* Student ID Number
(your school ID number):

* Academic Institution: Cornell University

Institution City: Ithaca

Institution State: New York

Institution Country: United States

* Academic Calendar: Semester

Independent Status

* Do you qualify as an independent student?

This field will only appear for Undergraduate Transfer Scholars and Graduate Scholars. All College Scholars are considered dependent students.

For Undergraduate Transfer Scholars and Graduate Scholars, select Yes from the dropdown only if you are designated an independent student as according to your Free Application for Federal Student Aid (FAFSA). If you are an independent student, please answer all of the corresponding questions.

For College Scholars and Undergraduate Transfer Scholars who according to the FAFSA are dependent students, select No. (If you are a College Scholar who according to FAFSA is an independent student, contact the Cooke Foundation via the Communication tool in CAP or by sending an email to finances@jkcf.org.)

Dependent Child Care

Undergraduate Transfer Scholars and Graduate Scholars only will be prompted to answer questions about funding for dependent child care. Refer to the Scholar Handbook and Dependent Expenses Financial

FAQs on the Foundation’s website (<https://www.jkcf.org/cooke-scholar-community/resources/>) for detailed information.

Dependent Child Care

- In certain circumstances the Cooke Foundation will consider the inclusion of expenses related to dependent children when determining a scholar’s cost of attendance.
- For such expenses to be considered you must complete the fields below and upload all documents requested (including your 1040 and your spouse’s W-2, if applicable).
- When entering School Expenses, provide the amount your school approves for dependent-related expenses. (Please note that you may need to talk with your financial aid officer to acquire this figure.)

*** Will you be requesting funding for dependent child care?**

Select One ▼

Year in School, Housing, Health Insurance, Enrollment Status

All undergraduate scholars must provide their year in school according to *federal financial aid eligibility*. All scholars (undergraduate and graduate) must provide housing plans, health insurance and enrollment status information.

*** Indicate your year in school according to your federal financial aid eligibility**

- First Year
- Second Year
- Third Year or Beyond
- Does Not Apply (Not eligible for federal financial aid)

*** Housing Plans - Where will you be staying?**

Select One ▼

*** Health Insurance Needs**

- Option 1: I will be covered under my parent’s plan -OR- I do not need health insurance included in my cost of attendance
- Option 2: I plan to enroll in my university’s health insurance plan and want the cost of health insurance included in my cost of attendance
- Option 3: My health insurance plan is through a third-party provider (if this option is selected, a signed letter from the university with the name of the provider and cost for the academic year is required)

*** Are you requesting funding for a full academic year or a single term?**

Select One ▼

*** Enrollment Status**

Select One ▼

Student Expenses

Enter your cost of attendance for the full academic year (if enrolled for the full academic year) or for an academic term (if enrolled for less than the full academic year). These costs must correspond to your cost of attendance/school budget from your online college account. If you have additional costs listed in your budget that do not correspond with one of the categories on the COA, select Yes for the question “Are there other expenses not listed on your school budget/costs (cost of attendance) form that were not captured above?” Otherwise, select No.

Student Expenses

* Tuition

* Fees

* Books

* Room and Board

* Personal Miscellaneous

* Transportation

* Computer

* Are there other expenses not listed on your school budget/costs (cost of attendance) form that were not captured above?

Financial Aid

Click the blue Enter Anticipated Financial Aid Resources button. This opens a new window where you will input all financial aid you've been awarded or are expected to be awarded. You will enter your entire gift aid amount for the full academic year (or term if enrolled for less than a full academic year) according to your financial aid summary/financial aid letter from your school. ***Follow all instructions provided.***

Anticipated Resources - 1

- Click the plus sign button (+) to add your anticipated resources for the entire academic year.
- Based on your most up-to-date financial aid summary, enter all scholarships and grants you expect to receive for the entire academic year. Do not include loans or work study.
- Click the applicable "Resource Type" from the dropdown and enter the amount.
- Under "Name/Description", provide the name and a brief description of all named scholarships you are receiving.
- To add additional financial aid/resources, click the plus sign button (+)
- Remember to include all other outside scholarships you have been awarded.
- If any resources are to be applied to one term only and not split evenly among terms, please make note in the "Name/Description" field (e.g., scholarship is only for fall term).
- If revising resources previously submitted, please enter the revised amount, or enter "0" (zero) if you are no longer receiving the aid.
- If you attend a foreign institution, please enter all resources in the native currency of the country you are attending school. If you are attending a U.S. institution, please enter your anticipated resources in U.S. dollars.

Resource Type	Amount	Name/Description
Federal Pell Grant	\$3,000.00	
Federal Supplemental Educational Opportunity Grant (SEOG)	\$2,000.00	
Institutional Grants/Scholarships	\$30,000.00	William Smith University Grant
Other Grants/Scholarships	\$1,000.00	Rotary Scholarship

Save Clear Close

Be sure to click Save and Close when finished entering your financial aid.

FAFSA

All Cooke Scholars eligible for federal financial aid (regardless of whether you receive federal aid) **MUST** complete the FAFSA each year. This is a requirement of the Cooke Foundation. If you are eligible for federal financial aid, you must complete the FAFSA and select Yes for this question. Next, enter your Expected Family Contribution (EFC) from your FAFSA Student Aid Report (SAR).

* Did you complete a FAFSA?

Expected Family Contribution (total for whole year)

Required Documents

You must complete the COA worksheet and have it signed by a school official. Please note that this worksheet includes language that allows your school to provide us with your FAFSA and financial aid data. Upload the worksheet and your school's financial aid summary in this section.

* Please upload your school budget/costs and financial aid summary.



File Name ▾

Northwestern_University_Customer_Account.docx

* Please upload your Cooke COA Worksheet.



File Name ▾

2019_COA_Summer_Worksheet_pdf_encrypted_pdf
 Northwestern_University_Customer_Account.docx

Financial Aid Office Information

In this section, you will provide information about their school's financial aid office. If you are working with a specific financial aid officer, provide his/her name, email address and phone number. If you are not working with a specific person or do not know your financial aid officer's name, enter "Financial Aid Office" in the name field and provide the email address and phone number for the financial aid office.

* Financial Aid Officer Name

* Financial Aid Officer E-mail Address

* Financial Aid Officer Phone Number

Scholar Verification

After completing all fields and verifying your numbers with your school costs/budget and financial aid summary, click the certification box and then click the Submit button to submit your COA to the Cooke Foundation.

* Scholar Verification Acknowledgement

I certify, to the best of my knowledge, that the information on this form is complete and accurate. I understand that falsification of any information will cause my disqualification from the scholarship program.

Submit

Contact Staff

If you have any questions, please contact Cooke Foundation staff by clicking the Contact Staff button (then select Finance-Related in the question type dropdown).

Award Notification

After you submit your COA, the Cooke Foundation will review it and contact the financial aid officer/office you designate to approve your Cooke Foundation award amount. Following your school's approval, the Cooke Foundation will send your award notification. Please note that your award may be all scholarship, all forgivable loan (undergraduate scholars only) or a combination of scholarship and loan (undergraduate scholars only). In addition, some scholars may receive full funding from other sources and not need funding from the Cooke Foundation in an academic year.

The following is a sample award notification:

Subject Line: 2019-2020 Jack Kent Cooke Foundation Award Amount

Dear Scholar,

We recently received your cost of attendance form and, after contacting your school and obtaining their approval, have determined your estimated Cooke Foundation scholarship award amount to be \$11,844.00. I've listed a breakdown of your expenses and your aid below, as they were listed on the submitted cost of attendance form. If any of these figures change during the year, you must contact the Cooke Foundation immediately. Your total Cooke award also includes federal Direct and PLUS loans. If you choose to take out federal loans to cover those costs that cannot be covered through our scholarship, and meet the Cooke Foundation's requirements for loan forgiveness, you will be eligible to have up to \$9,100.00 in federal loan funding repaid by the Cooke Foundation upon your graduation. To accept or decline these loans, log in to the Cooke Access Portal (CAP), click Loan Forgiveness Agreements under your To Do List, and follow the instructions.

EXPENSES:

\$45,612.00 Tuition

\$599.00 Fees

\$2,354.00 Health Insurance

\$930.00 Books

\$14,330.00 Room and Board

\$1,850.00 Personal Expenses

\$220.00 Transportation Expenses

\$1,500.00 Computer Allowance

\$67,395.00 TOTAL

RESOURCES/AID:

\$11,844.00 Cooke Foundation Scholarship

\$5,500.00 Federal Direct loan (eligible for Cooke Foundation loan forgiveness)

\$3,600.00 Federal PLUS loan (eligible for Cooke Foundation loan forgiveness)

\$37,781.00 Institutional Grants/Scholarships

\$5,920.00 Federal Pell Grant

\$2,750.00 Federal Supplemental Educational Opportunity Grant (SEOG)

\$67,395.00 TOTAL

You will also find attached documents that provide additional information about your award, including the payment process, forgivable loan instructions, and a sample loan disclosure statement. Please review these important documents, retain them for future reference, and follow all instructions to sign the loan agreement letters and upload the required disclosure statements.

You must accept or decline the above loans via CAP.

As soon as your fall term charges post to your account, upload your billing statement via CAP. The billing statement must show itemized charges for tuition, fees, and if applicable, on-campus room and board. We must receive a bill to issue your check. For all returning Cooke Scholars, payment of your scholarship is also contingent upon the Cooke Foundation receiving from you a satisfactory 2018-2019 annual report and transcript.

If you have any questions, please call our finances team at 703-723-8000 or send a communication via CAP by selecting Finance-Related from the Scholar Question Type dropdown.

To obtain a copy of your award letter via the CAP system, follow these steps:

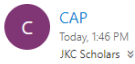
1. On your CAP Dashboard, click on My Communications.
2. On your My Communications To-Do List, click on the COA Form E-mails tab, and then click View.
3. This will open your award email. To view the HTML version, follow the link under the Message line.

Cooke Forgivable Loan Program – for eligible Cooke Undergraduate Scholars only

For undergraduate scholars receiving forgivable loan(s), additional steps through CAP are required to accept, partially accept or decline the loan(s) as well as to sign the loan agreement letter(s). If a Parent PLUS loan is also part of your award, you must accept, partially accept or decline the PLUS loan on your parent's behalf. Therefore, please discuss this funding with your parent(s). If you accept or partially accept, you will provide, via CAP, information about your parent who will take out the loan.

The following is a sample of the email you will receive from CAP@jkcf.org instructing you to log in to CAP to take action on a loan. ***Please watch for this email. If you do not receive it within 24 hours, check your Junk and Spam email boxes. If you still cannot locate this email, contact the Cooke Foundation by sending a communication via CAP or an email to finances@jkcf.org.***

Action Required - Loan Forgiveness Documents Needed



Reply all

Dear John,

This email serves as notification that you must take action in order to participate in the Cooke Foundation's loan forgiveness program. A loan agreement letter has been created through the Cooke Access Portal (CAP). You must log in to CAP, click "Loan Forgiveness Agreements" under your To Do List and follow the instructions. You will be prompted to accept, partially accept or decline participation in this program. If you accept or partially accept participation, you will receive an email allowing you to electronically sign your loan agreement letter. You must also upload to CAP your loan disclosure statement.

A signed loan agreement letter and uploaded disclosure statement must be completed by November 02, 2018. 9
Please login in to CAP: <https://account.jkcf.org>.

To obtain your loan disclosure statement, login to www.studentloans.gov using your Federal Student Aid (FSA) ID. The statement will be available by year via the left navigation link. Upload the 2019-2020 loan disclosure statement to CAP.

If you have questions, please send an email to finances@jkcf.org or send a communication through CAP.

Thank you,

Cooke Foundation Scholarship Finances Team

After you log in to CAP, click on Loan Forgiveness Agreement under your To Do List. Click the View button to the far right next to the loan for which you need to take action.

The screenshot shows the 'To Do List' dashboard with the following sections:

- About Me**
- My Academics & Activities**
 - My Academic Institutions
 - My Grades
 - My Communications
- My Cost of Attendance Forms**
 - My COA Forms
 - My Scholarship Payments
 - My Loan Forgiveness Agreements

The 'To Do List' section is highlighted in orange and contains the following table:

#	Scholarship	COA Form	Academic Institution	Academic Year	Loan Forgiveness Type	Approved Loan Amount	Due Date	
1	College Scholar (CS)	Returning College Scholar	Duke University	2018-2019	Direct Loan Forgiveness Agreement	\$7,500.00	11/02/2018	View
2	College Scholar (CS)	Returning College Scholar	Duke University	2018-2019	PLUS Loan Forgiveness Agreement	\$350.00	11/02/2018	View

You will then see the page allowing you to accept, partially accept, or decline the loan. If you are unsure about your loan decision, we advise you to accept the full amount of the loan. You may always take out less or decline the loan later. Therefore, it is to your advantage to accept the full loan now if you are undecided.

Direct Loan Forgiveness Agreement: 2018-2019

* Loan Decision Due Date

08/08/2018

* Approved Loan Amount

\$3,921.00

* Loan Forgiveness Decision

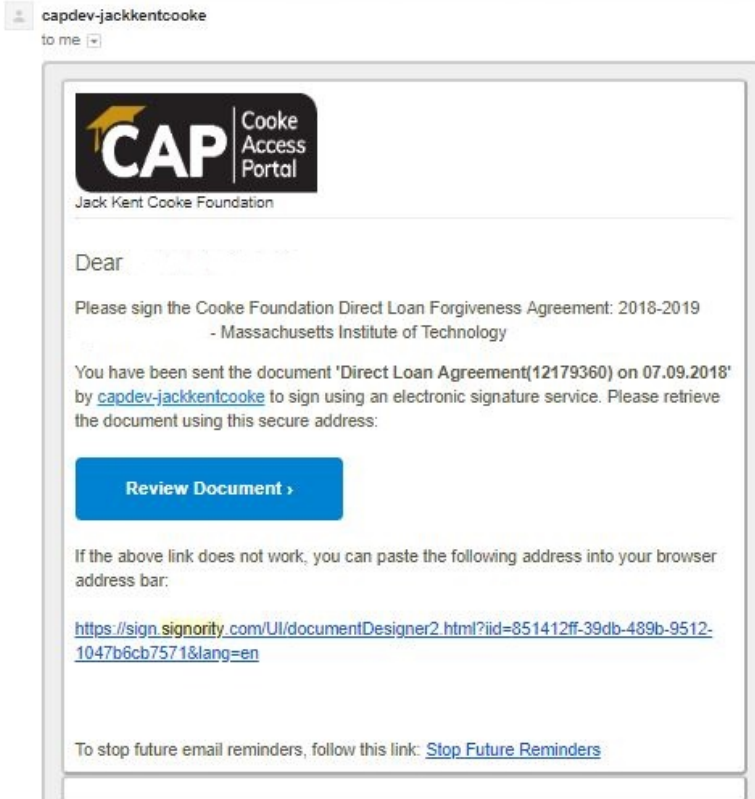
Select One

- Select One
- Accept
- Partially Accept
- Full Decline

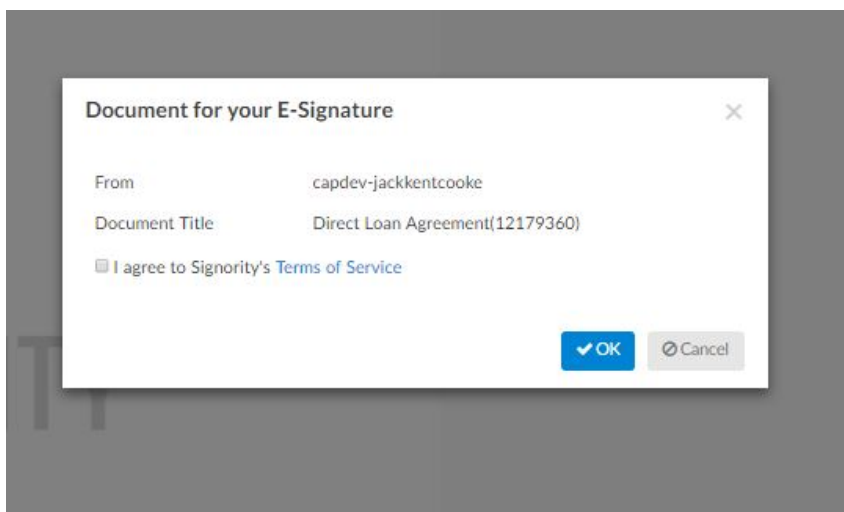
Once you accept the loan(s), you/your parent will receive an email that instructs you/your parent to sign the loan agreement letter(s). Click the Review Document button in the email. **Once again, please watch**

for this email. If you do not receive it within 24 hours, check your Junk and Spam email boxes. If you still cannot locate this email, contact the Cooke Foundation by sending a communication via CAP or an email to finances@jkcf.org.

Signature Required for Cooke Foundation Direct Loan Forgiveness Agreement: 2018-2019



Check the box next to “I Agree to Signority’s Terms of Service” and click OK.



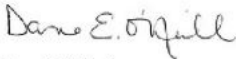
Read the letter, e-sign where indicated and click the Submit button. This action automatically signs the loan agreement and links it to your CAP account. Please note that only the e-signature portion of the letter is displayed below.

SIGNORITY Parent_PLUS_Loan_Agreement(1217913...

You must electronically sign this loan agreement letter via Signority and email the disclosure statement or have _____ upload your disclosure statement to CAP by November 02, 2018, in order to be eligible to have the foundation repay your PLUS loan upon _____ graduation.

Please direct any questions to finances@jkcf.org.

Sincerely,




Dana E. O'Neill
Director, Higher Education Programs

Borrower's Signature (Parent or Guardian):

By signing this letter, I agree to take out a PLUS loan in the amount of up to \$13,500.00.

By: _____
Name: _____
Date: June 27, 2018



Remember too that you must upload all loan disclosure statements, via CAP, by November 2. You do this by clicking the View button next to the corresponding loan located under Loan Forgiveness Agreements on your To Do List. Upload the disclosure statement(s) by clicking the upload button located under the “Please upload the PDF Disclosure Statement” section. Then click Submit.


* Approved Loan Amount


\$5,500.00

* Loan Forgiveness Decision

* Signed Loan Forgiveness Agreement

* Please upload the PDF Disclosure Statement





Bill Submission

Immediately after you receive your award notification (which indicates that your COA has been processed and approved), you may upload your billing statement. A task will appear under Payments on your To Do List on your CAP dashboard. Click on Payments or the My Scholarship Payments link to upload your current bill. Click the View button next to the correct scholarship payment line. Pay attention to the due date so that the correct bill is provided for the current term.

The screenshot shows the CAP dashboard with navigation tabs for 'My Dashboard', 'My Academics & Activities', and 'My Cost of Attendance Forms'. Under 'My Academics & Activities', there are links for 'My Academic Institutions', 'My Grades', and 'My Communications'. Under 'My Cost of Attendance Forms', there are links for 'My COA Forms', 'My Scholarship Payments', and 'My Loan Forgiveness Agreements'. Below this is a 'To Do List' section with a yellow header and a table of tasks. The 'PAYMENTS (2)' tab is active, showing two entries for 'College Scholar (CS)' at 'Dartmouth College' for the '2017-2018' academic year. The first entry is for the 'Fall' term with a due date of '09/01/2017'. The second entry is for the 'Spring' term with a due date of '03/01/2018'. Each entry has a 'View' button.

#	Scholarship	COA Form	Academic Institution	Academic Year	School Term	Due Date	
1	College Scholar (CS)	Returning College Scholar	Dartmouth College	2017-2018	Fall	09/01/2017	View
2	College Scholar (CS)	Returning College Scholar	Dartmouth College	2017-2018	Spring	03/01/2018	View

Acceptable bills (print screen or PDF), must include the following:

- Your name
- Your school's name
- An itemized list of tuition and fees, and, if applicable, on-campus room & board and health insurance for the term

Upload your bill by clicking on the upload button under "Please upload the Bill" and click Submit.

The screenshot shows a form titled 'Scholarship Payment (fall): 2019-2020...'. It has a navigation bar with 'Main' and 'Notes' tabs. The form contains the following fields:

- * Documentation Due Date: 09/01/2019
- * School Term: fall
- * Please upload the Bill: A blue button with an upload icon.

At the bottom of the form is a blue 'Submit' button.

Please note that the Foundation will schedule all your payments for the entire academic year.

If you are on a semester system, the bill due date schedule is as follows:

Fall - 9/1

Spring - 1/1

If you are on a quarter or trimester system, the bill due dates are as follows:

Fall - 9/1

Winter - 1/1

Spring - 3/1

You are encouraged to upload your bill earlier than the due date. Remember that the Cooke Foundation requires two to three weeks to process your bills before payment will be sent to your school. In addition, we do not pay late fees, so upload your billing statements as soon as your school makes them available.